Energy One (ECOS)

Scope of Work Document

Submitted To: Ney McCain and Shawn

McCain

Submitted By: James Hasan

Version: SOW V1.0

Dear Ney McCain and Shawn McCain,

We would like to thank you for giving App Maisters Inc. the opportunity to provide you with professional services for developing an iOS/Android Mobile Application for Marketing Rep and Sales Director along with a Web Application for Super Admin, Company Admin, Office Manager, Human Resources and Sales & Marketing Manager.

With App Maisters Inc.'s extensive experience and expertise of managing complex consumer & commercial projects, we assure you that the quality of our services will not only meet but exceed your expectations.

We thank you once again for your confidence in us and we are keen to provide you with our services.

Sincerely,

James Hasan

Project Manager

App Maisters Inc.

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1. Overall Objective:

The primary function of the Energy One platform is to empower marketing representatives and sales directors to deliver effective presentations to homeowners, thereby increasing the likelihood of achieving successful sales. The final application will include a mobile app and a web portal for managing their day-to-day operations for their employees and resellers. The mobile app will include a link to Energy One's Virtual Coach website, where all training materials are available. Additionally, users will have the ability to provide customers with estimates, utilize AI to calculate window sizes through tablet cameras, showcase windows, and place orders. The final app will also provide a web portal for Energy one Admin and Resellers(Company Admin, Office Manager, Human Resources and Sales & Marketing Manager) an ability to perform functions that will help these roles in facilitating their respective sales and marketing team to close deals.

2. Application Profiles:

Energy One mobile app and web portal will support the following roles within the application.
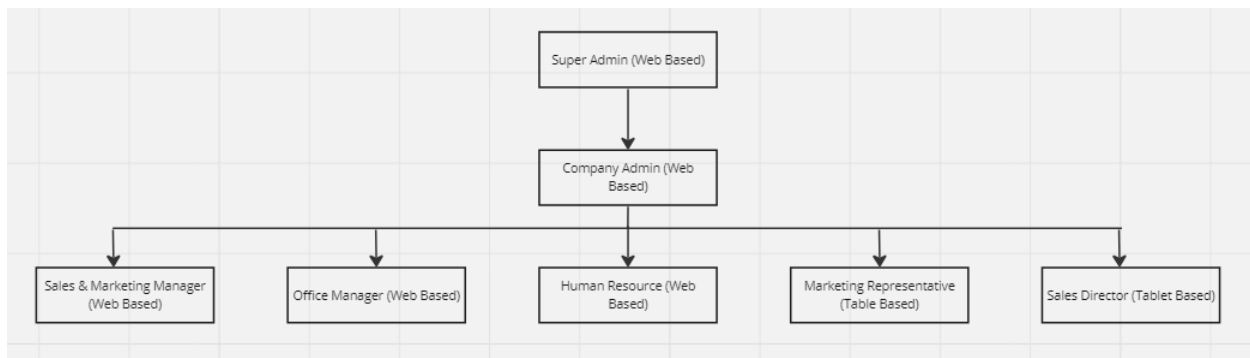
Super Admin (Web Based): The Super Admin holds an important role with extensive control over all associated companies. They have all permissions for content management, user and company account administration, product and pricing control, management of the customer database. Super Admin also plays a central role in ensuring system functionality, data integrity, and customization.

Company Admin (Web Based): The role is focused on managing their associated company's operations. They have permissions for back-end editing, content replacement, user account

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administration, control over audio recordings, digital contracts, and customer database management. This role ensures tailored functionality and data integrity within their specific company domain.

Sales & Marketing Manager (Web Based): This role focuses on managing sales and marketing efforts. Responsibilities include presentation management, product category oversight, photo gallery curation, sales optimization, digital contract handling, and access to the customer database for effective sales and marketing strategies.

Office Manager (Web Based): The Office Manager is primarily responsible for managing the operations. This role includes managing digital contracts with access for upload/download, handling Window Sales through window selection, cart and financing, managing audio recording with access for listening. Additionally, the Office Manager has access to the customer database for administrative purposes.

Human Resource (Web Based): The Human Resources role involves managing resources and their performance for which they have access to listening audio recordings and they can access and edit the customer database for HR-related purposes.

Marketing Representative (Tablet Based): Marketing Representatives in the pre-sales phase are focused on engaging potential clients. They have access to tools like canvassing/presentation through which they can deliver effective presentations. They can also provide clients with estimates and access training material through virtual coach. They are supposed to record their pitch using the record functionality for management to review.

Sales Director (Tablet Based): The Sales Director possesses all the capabilities of Marketing Representatives and has the authority to lock sales and guide clients through the entire sales process. They can conduct presentations, provide detailed product information, manage digital contracts, utilize marketing resources, record sales interactions, and access training materials.

3. Branding:

The application will support the branded guidelines provided by the Client for both Mobile and Web App.

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4. Mobile Application - iOS/Android tablet App

The primary function of the mobile app is to empower marketing representatives and sales directors to deliver effective presentations to homeowners, thereby increasing the likelihood of achieving successful sales. The app will include a link to Energy One's Virtual Coach website, where all training materials are available. Additionally, users will have the ability to provide customers with estimates, utilize AI to calculate window sizes through tablet cameras, showcase windows, and place orders.

4.1   Functional Hierarchy of iOS/Android Tablet Application

➤ Splash
➤ Sign In
  • Forgot Password
➤ Home/Main Menu
  • Presentation/Canvassing

    o   Our Company
    o   Presentation
    o   Presentation 2
    o   Marketing Home
    o   Warranty
    o   Glass Package
    o   Energy Savings
    o   Photo Gallery
    o   Presentation 3
    o   Testimonials

  • Windows Sales (Only for Sales Director)
    o   AI Windows
    o   Window Selection
    o   Energy Cost
    o   Cart
    o   Side by Side
    o   Reveal
    o   Finance
    o   Digital Contract
  • Virtual Coach
  • DIY System

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- Record
- Profile Management
- Account Management
  - Change Password
  - Delete Account
  - Log Out
- Notifications
- Privacy Policy

4.2 Functional Details of iOS/Android tablet Application

4.3 Splash:

The app will be available to download via both Apple and Google Store. Once the user downloads the app and taps the app icon on their phone, they will be presented with a splash screen that displays the app's name and logo. This splash screen will also serve as a loading screen for the application.

4.4 Sign-In:

After the splash screen, users will be directed to a login screen where they can enter their credentials. For the initial login, users are required to input the email address and password provided to them via email from the admin. If the login credentials are correct, the user will gain access to the app. In the case of incorrect credentials, an error message will be displayed, indicating an invalid username or password.

Upon the first-time login, users will be directed to a password change screen. They will be prompted to enter their current password, create a new password, and confirm the new password. The new password must meet specific requirements, including a minimum length of 8 characters and at least one uppercase letter, one lowercase letter, one numeric character, and one special character (e.g., @, &, _, #, etc.).

Upon successfully submitting and updating the password, the user will be redirected back to the login screen to log in using their newly modified credentials.

4.5 Forgot Password:

On the Sign In screen, users will find a "Forgot Password" link. When tapped, this link will prompt the user to enter their email address. After submitting the email address, a 6-digit code

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will be generated and sent to the provided email address. The
user will need to enter this code on the screen and submit it for authentication. Once the code
is successfully authenticated, they will be redirected to a screen where they can set up a new
password.

During the password setup stage, users will be prompted to create a unique and strong
password. The new password must be a minimum of 8 characters long and include at least one
uppercase letter, one lowercase letter, one numeric character, and one special character (e.g.,
@, &, _, #, etc.).

Upon successfully submitting and updating the password, the user will be redirected back to
the login screen to log in using their newly modified credentials.

4.6 Home/Main Menu:

After signing in, the user will be directed to the Home screen which will also serve as a Main
Menu displaying the following options according to the users user role:

Marketing Representative	Sales Director
Canvassing	Presentation
Virtual Coach	Windows Sales
DIY Systems	Virtual Coach
	DIY Systems

4.7 Presentation/Canvassing:

This section will be called "Presentation" for the Sales Director and Canvassing for the
Marketing Representatives. The business objective for this section to provide the user with the
capability to present slides/videos to potential customers. Once the user clicks on
Presentation/Canvassing, they will be presented with the following modules to select from:

- Our Company
- Presentation
- Presentation 2
- Marketing Home
- Warranty
- Glass Package
- Energy Savings
- Photo Gallery

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- Presentation 3
- Testimonials

Upon selecting any module other than "Presentation", the user will be shown a new interface housing two folders: "Presentation" and "Video."

After selecting the "Presentation" folder, the user will navigate seamlessly through static images using "Next" and "Previous" buttons, with a sliding transition effect between each image. The user will also have the option to download these images so that they may present them when they are not connected to the internet. The images in this folder will be uploaded by the Super Admin or Company Admin who will also define the sequence in which these images will be presented.

After selecting the "Videos" folder, the user can easily select and play any of the videos. The user will also have the option to download these videos so that they may present them when they are not connected to the internet. These videos will also be uploaded by the Super Admin or Company Admin.

When the user selects the module for "Presentation", the user will directly be taken to the "Presentation" folder where they will navigate seamlessly through static images using "Next" and "Previous" buttons, with a sliding transition effect between each image. The user will also have the option to download these images so that they may present them when they are not connected to the internet. The images in this folder will be uploaded by the Super Admin or Company Admin who will also define the sequence in which these images will be presented.

4.8 Windows Sales:

This module will only be available for the Sales Director. The business objective for this module is to initiate the sales process. When the user selects "Windows Sales" they will be presented with the following options:

- AI Windows
- Windows Sales
- Energy Cost
- Cart
- Side by Side

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- Reveal
- Financing
- Digital Contract

4.8.1 AI Windows:

Upon choosing "AI Windows," the user's tablet camera will open. As the user scans the customers' windows, the AI algorithm will determine and provide the window's dimensions in inches. It will provide the height and width of the window along with united Inches (i.e. height + width). These measurements will also be automatically populated within the contract.

If the user has previously selected a window, AI Windows will generate an AR image of the chosen window within the designated area.

4.8.2 Windows Sales:

Upon selecting Windows Sales, the user will be presented with the following screen so that they may choose a suitable product:

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Further details about each field of this screen are mentioned below:

Window Vendor Box Features: The app will provide a range of vendor options for selection, with the flexibility to edit the vendor list on the backend. Each vendor will present its own series offerings. Once chosen, this selection will persist throughout window choices and cart additions unless manually modified by the user. Energy One will supply the list of vendors, making this a mandatory field in the process.

Window Series Box Features: The window Series are specific to each vendor and encompass all available window options. Within each Series, there will be a comprehensive list of products, along with their corresponding options and prices. This encompasses color choices, grid patterns, size restrictions, and window types. The chosen Series will populate the image carousel at the screen's top and dictate color, size, and grid options. Each Series option will come with editable prices on the backend and will be reflected in the Digital Contract post-purchase. Once chosen, this selection will remain effective throughout window choices and cart additions, unless manually adjusted by the user. Energy One will provide the list of relevant series, making this a mandatory field in the process.

Product Carousel Features: The carousel section will be inactive and grayed out until both the Window Vendor and Window Series are selected. Once a vendor is chosen from the dropdown boxes, the carousel will populate with relevant options and become interactive. All options will be specific to the chosen vendor and Series. The Product Carousel will showcase available window and patio door images from the selected vendor, each accompanied by a product name at the bottom. Users will have controls to scroll through the available options, and selecting a product will highlight it. The chosen product will then appear in the product presentation window located below the carousel.

Product Presentation Window Features: A product chosen from the product carousel will appear in the product presentation window. This space will remain empty if no product is selected. The image displayed here will be a 3D rendering of the product, capable of a 360˚ rotation to showcase all angles, if possible. The image will dynamically change colors according to the user's selections, with the ability to display distinct interior and exterior colors when applicable. Furthermore, the image will accurately reflect selected grid options when applied.

Window Style Box Features: The window Style Box options are specific to the chosen vendor and window series. These style choices can be accessed through a dropdown box. When a style option is selected, it will alter the appearance of the window currently displayed in the Product Presentation Window. Different styles can also influence the window's price. All chosen styles

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and resulting price changes will be accurately represented in
both the digital contract and the shopping cart. This style selection will only apply to the ongoing window selection and should reset to a default blank field once the window is added to the cart. Energy One will provide the list of relevant styles, making this a mandatory field in the process.

House Exterior Color Box Features: The House Exterior Color Box options are specific to the chosen vendor and window series. These exterior color choices can be accessed through a dropdown box. The selected colors can influence the window's price. All House Exterior color selections and resulting price changes will be accurately reflected in both the digital contract and the shopping cart. Once chosen, this color option will apply to all window selections and cart additions, unless manually modified by the user. Energy One will provide the list of relevant colors, making this a mandatory field in the process.

Window Interior Color Box Features: The window Interior Color Box options are specific to the chosen vendor and window series. These interior color selections can be accessed via a dropdown box. Upon selecting a color option, it will alter the color of the window currently displayed in the Product Presentation Window. Chosen colors can have an impact on the window's price. All color selections and resulting price adjustments will be accurately recorded in both the digital contract and the shopping cart. Once chosen, this color option will persist throughout window selections and cart additions, unless manually modified by the user. Energy One will provide the list of applicable colors, making this a mandatory field in the process.

Window Exterior Color Box options: The window Exterior Color Box options are specific to the chosen vendor and window series. These exterior color choices can be accessed through a dropdown box. Upon selecting a color option, it will modify the color of the window currently shown in the Product Presentation Window. Chosen colors can impact the window's price. All color selections and resulting price variations must be accurately represented in both the digital contract and the shopping cart. Once chosen, this color option will remain effective for all window selections and cart additions, unless manually altered by the user. Energy One will supply the list of relevant colors, making this a mandatory field in the process.

Window Glass Package Box Features: The window Glass Package Box options are specific to the chosen vendor and window series. These Glass Package choices are available through radio buttons. The selected Glass Package will influence the window's price. All Glass Package selections and resulting price variations must be accurately shown in both the digital contract

and the shopping cart. Energy One will provide the list of applicable Glass Packages, making this a mandatory field in the process.

Window Tempering Box Features: The Window Tempering Box options are tailored to the chosen vendor and window series. These Tempering choices can be selected using radio buttons. The chosen Tempering option will influence the window's price. All Tempering selections and resulting price variations must be accurately represented in both the digital contract and the shopping cart. It's important to note that the Window Tempering Box will not alter the image displayed in the Product Presentation Window. Energy One will provide the list of relevant Tempering options, making this a mandatory field in the process.

Obscured Box Features: The Obscured Box options are specific to the chosen vendor and window series. Obscured choices can be made using both radio buttons and a dropdown box. The selected Obscured option will impact the window's price. All Obscured selections and resulting price variations must be accurately recorded in both the digital contract and the shopping cart. It's important to note that the Obscured Box will not alter the image displayed in the Product Presentation Window. Energy One will provide the list of relevant Obscured options, making this a mandatory field in the process.

Window Grid Options Box Features: The window Grid Options Box is tailored to the selected vendor and window series. Grid options can be chosen using radio buttons and a dropdown box that should show graphic images of each available grid style. Any selected grid options will be applied to the window showcased in the Product Presentation Window. Certain grid options may be applicable to specific sections of particular window types. All Grid selections and associated price variations must be accurately captured in both the digital contract and the shopping cart. Energy One will provide the list of relevant options.

Window Options Box Features: The Options Box is designed for requesting custom services provided by Energy One. These options can be accessed through a dropdown box. Chosen options will have an impact on the window's price. All option selections and resulting price adjustments must be accurately displayed in both the digital contract and the shopping cart. Energy One will supply the list of applicable options for selection.

Window Custom Options Box Features: The Custom Options Box is intended for requesting specific custom services provided by Energy One. These options can be chosen from a dropdown box. Selected custom options will influence the window's price. All chosen custom

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options and resulting price adjustments must be accurately
included in both the digital contract and the shopping cart. Energy One will provide a list of
applicable custom options for users to select from.

Add Picture Button Features: The Add Picture button facilitates connecting to the device's
camera to capture a photo of a customer's existing window. Upon selecting the Add Picture
button and taking a photo, it is stored and linked to the previously chosen "Location" option by
the user. If no "Location" has been selected, a notification prompts the user to choose a
location first. Added photos are integrated with other customer data and associated with it.
Whenever the Add Picture button is clicked to attach a photo to a customer's information,
authorized profiles can access these photos via the website portal.

Window Width Box Features: The window Width Box options are tailored to the chosen vendor
and window series. Width options can be chosen using a dropdown box. The selected widths
will influence the window's price. All width selections and resulting price variations must be
accurately displayed in both the digital contract and the shopping cart. Energy One will provide
the list of relevant sizes, making this a mandatory field in the process.

Window Height Box Features: The window Height Box options are customized to the chosen
vendor and window series. Height options can be selected using a dropdown box. The chosen
heights will influence the window's price. All height selections and resulting price variations
must be accurately represented in both the digital contract and the shopping cart. Energy One
will provide the list of relevant sizes, making this a mandatory field in the process.

Comments Box Features: The Comments Box is designed for adding notes regarding the
window shown in the Product Presentation window. All comments entered will be accurately
included in the digital contract and will appear alongside the corresponding window selection.
Users have the flexibility to input comments either through typing or voice commands.

Add To Cart Button Features: The Add To Cart button serves as the final step in confirming the
individual window and options selection process. When this button is clicked, all window details
are recorded in a database, generating an item in the cart. Additionally, selecting the Add To
Cart button restores the Window Selection page to its default settings. Upon clicking the
button, a notification window appears, confirming the successful addition of requested
windows to the cart and offering the user the option to proceed to the Checkout section of the
program.

Go to Cart Button Features: Upon selecting the Go to Cart button, all information regarding the window and option selections is entered into a database, generating the Digital Contract. Additionally, clicking the Go to Cart button records window details in the database, creating the Competitor Price Comparison Screen, which calculates our price against that of our competitor. This button also restores the Window Selection page to its default settings. The Go to Cart button's purpose is to navigate to the Cart screen for further proceedings.

Patio Door Options Box Features: The Patio Door Options Box presents various choices for the offered Patio Doors. These options can be selected through radio buttons and a dropdown box. The selected Patio Door Options will influence the window's price. Energy One will provide the list of relevant Patio Door Options. All chosen Patio Door selections and related price adjustments must be accurately recorded in both the digital contract and the shopping cart. This is a mandatory field if a Patio Door has been selected in the previous steps.

Window Location Box Features: The Window Location Box options pertain to the position within the house where the window is intended to be installed. These location options can be chosen using radio buttons and a dropdown box. Energy One will provide the list of relevant location options. This feature will also connect with any photos taken for each selected location by using the "Add Photo" button. This is a mandatory field.

4.8.3 Energy Cost

The business objective of this section is to provide customers with their annual savings if they switch to EnergyOne windows. This will be used Sales Directors to convince customers to make a purchase. Upon selecting "Energy Cost", user will be presented with the following screen:

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Upon entering the customer's Average Monthly Energy Bill, the user will be shown the customer's anticipated monthly energy bill after replacing their existing windows. This outcome, calculated using the formula which will be coded in backend, will also include the projected annual savings that the customer can expect.

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4.8.4 Cart

Upon selecting "Cart", the user will be presented with the following screen so that they may review the products in their cart.
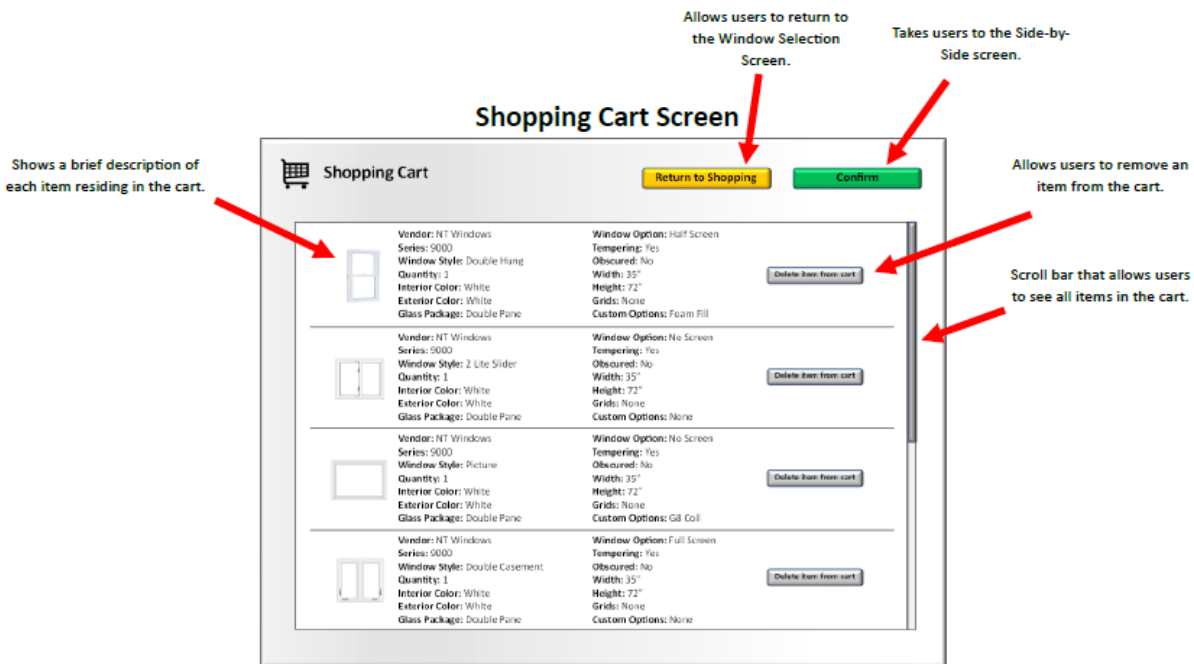
Information from "AI Windows" and "Window Selection" will automatically be populated in the Shopping Cart screen.

4.8.5 Side by Side:

Upon selecting "Side by Side" the user will be shown a new interface housing two folders, "Presentation" and "Video". By using this the user can provide presentation or show videos to potential customers.

After selecting the "Presentation" folder, the user will navigate seamlessly through static images using "Next" and "Previous" buttons, with a sliding transition effect between each image. The user will also have the option to download these images so that they may present them when they are not connected to the internet. The images in this folder will be uploaded by the Super Admin or Company Admin who will also define the sequence in which these images will be presented.

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After selecting the "Videos" folder, the user can easily select
and play any of the videos. The user will also have the option to download these videos so that
they may present them when they are not connected to the internet. These videos will also be
uploaded by the Super Admin or Company Admin.

4.8.6 Reveal:

The business objective of this module is to provide potential customers with approximate prices
of competing companies compared to approximate price of EnergyOne windows along with the
potential savings which can be done by installing EnergyOne Windows. Information previously
input by the user in AI Windows, Window Selection, Cart, and the Energy Cost module, will be
transmitted the Reveal module. Utilizing the formula coded in backend, the Price Reveal Screen
will then furnish the user with not only Energy One's price but also competitor prices.
Additionally, a button within the Price Reveal Screen will enable the user to easily navigate back
to the Marketing Home screen.

Upon accessing the Marketing Home Screen, the user will encounter a display featuring
competitor prices, Energy One's standard price, and the discounted Energy One price.
Furthermore, the user will be provided with a projection of the customer's estimated savings
over a 10-year period should they opt to purchase windows from Energy One.

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4.8.7 Financing

The business objective of this module is to present slides/videos to potential customers which will give them a walk through of the available financing options.
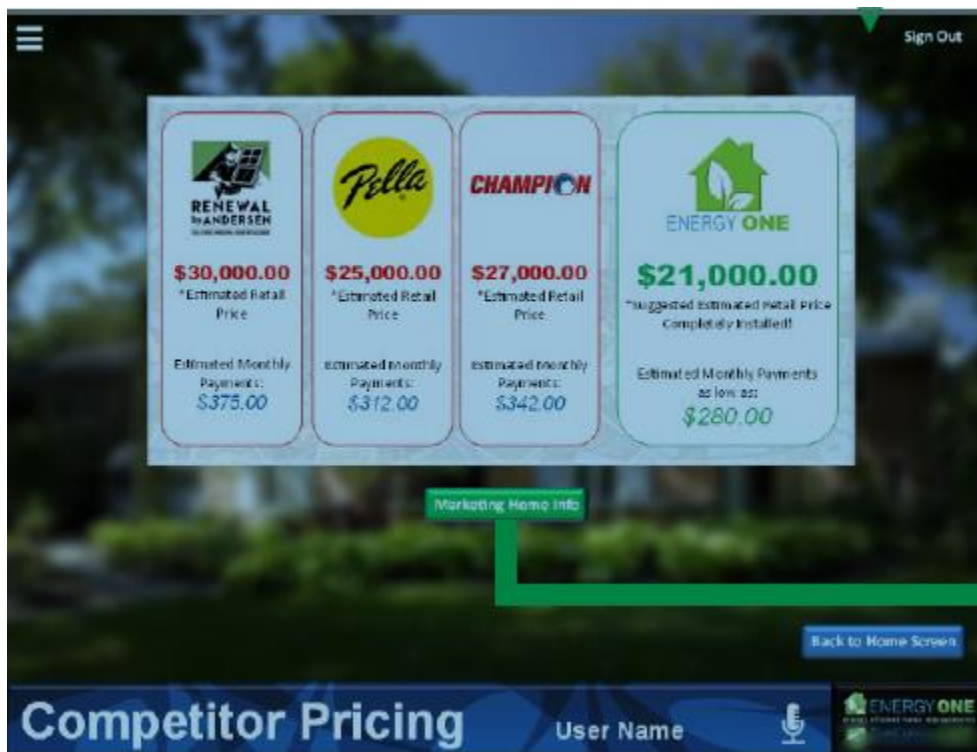
Upon selecting "Financing", the user will be shown a new interface housing two folders: "Presentation" and "Video." By using this the user can provide presentation or show videos to potential customers.

After selecting the "Presentation" folder, the user will navigate seamlessly through static images using "Next" and "Previous" buttons, with a sliding transition effect between each image. The user will also have the option to download these images so that they may present them when they are not connected to the internet. The images in this folder will be uploaded by the Super Admin or Company Admin who will also define the sequence in which these images will be presented.
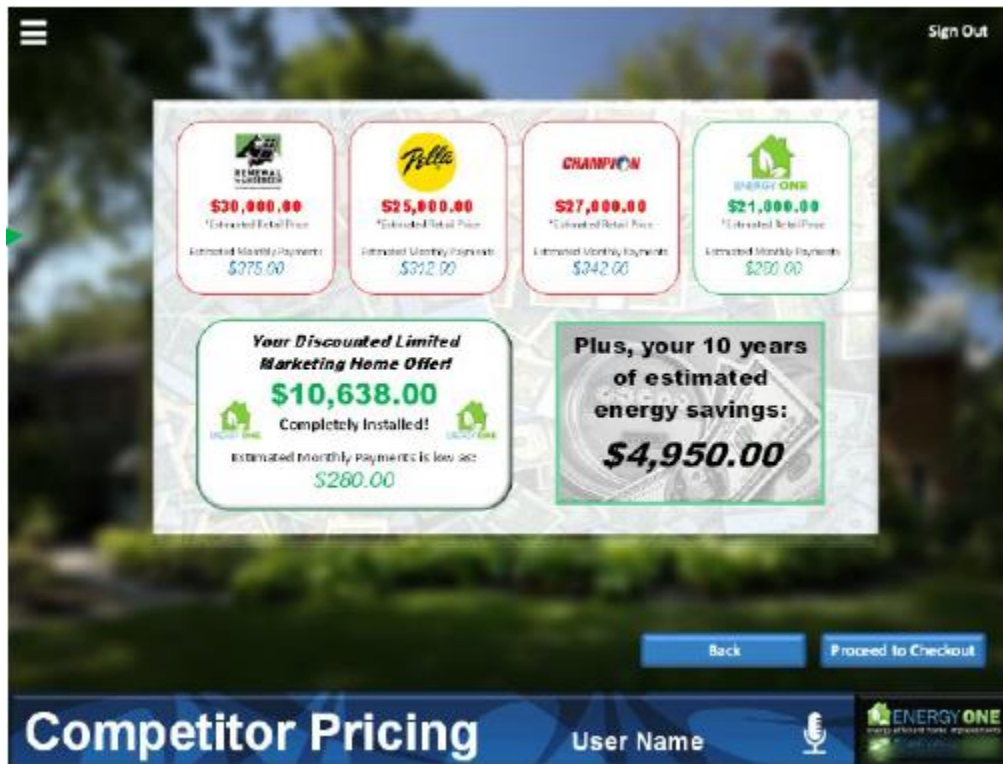
After selecting the "Videos" folder, the user can easily select and play any of the videos. The user will also have the option to download these videos so that they may present them when

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they are not connected to the internet. These videos will also be uploaded by the Super Admin or Company Admin.

4.8.8 Digital Contract

The objective of this section is to lock a sale by signing the contract. Upon selecting "Digital Contract", the user will be presented with the following screen through which they can have the customer sign the contract:

This module effectively combines information from "Contact Info," "Window Selection," and the "Cart," automatically populating the "Digital Contracts" section. The user will manually complete the remaining fields. The contract's electronic signing function will resemble that of Docusign or Echosign, ensuring swift validation. We have the option to integrate the paid APK for Docusign or Echosign, if supplied by the client. The contract will reside on the user's tablet and will be backed up to the cloud whenever the user is connected to the internet. The Super Admin will have the option to modify the wordings of the contract once uploaded to cloud.

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4.9 Virtual Coach:

Upon clicking the "Virtual Coach" button, the user will be redirected to the Virtual Coach website where they can access training material uploaded by EnergyOne's management. Training material will mostly by in form of educational videos which may include genres such as, the art of persuasion, sales, door knocking, motivational. Please note, this is an external site directly managed by EnergyOne.

The client has provided credentials for Virtual Coach platform.

4.10 DIY Systems:

The client has previously developed a web app for DIY Systems. This application prompts users to answer a set of questions, based on which estimates for new window installations are provided, along with competitor and Energy One's discounted prices. This allows the users (Marketing Director and Sales Representatives) to get estimates for new windows without having to schedule a visit by the Marketing Representative or Sales Director.

Client has provided credentials for current DIY Platform.

We are tasked with recreating these exact functionalities for mobile application. The client will supply the code from their existing web application to facilitate the replication of these functions into mobile application.

4.11 Footer:

Throughout the application, the footer will consistently display the following elements:

- The name of the module being accessed in large letters.
- The name of the user who has signed in, displayed in small letters.
- Blue leaf branding with the company's logo on the right side.
- A button for the record function.

4.11.1 Record

The business objective of this functionality is to provide management the ability to review Marketing Representatives and Sales Directors recording when they deliver presentation to potential clients. This will allow them to have a check on them in case of any dispute or mis commitment with the client.

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Clicking the 'Record' button will initiate audio and screen recording. As the user starts recording, an easily accessible 'Finish recording' button will be positioned in the application's footer. These recording will help the management evaluate performance of the users.

During an active recording session, the user can navigate within the application. When choosing to conclude the recording, the captured content will be saved in the Cloud if the user is connected to the internet. If the recording is saved in the Cloud, the user won't have direct access to it. However, if the user was not connected to the internet, the recording will be saved on the user's tablet, making it accessible. The user can later upload the recording to the Cloud when a stable internet connection is established.

4.12 Side Menu:

The side menu refers to a navigational component located on the side of the screen. It will provide users with quick access to various app sections and functionalities, enabling seamless and efficient navigation. By offering a collapsible and expandable list of options, the side menu will optimize screen space and enhances the overall user experience.

The following sections will be covered in the side menu

- Account Management
    - o Profile Management
    - o Change Password
    - o Delete Account
    - o Log Out
- Notifications
- Privacy Policy

4.13 Account Management

After clicking on "Account Management," the user will be presented with the options to:

- Profile Management
- Change Password
- Delete Account
- Log Out

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4.13.1 Profile Management

This section allows the end users of tablet application i.e. Marketing Representatives and Sales Directors to update their personal information so that the management has their latest details.

After clicking on "Profile Management," the user will be presented with their profile information, including their first name, last name, email address, and contact number. Users will have the option to edit their profile and save any changes.

4.13.2 Change Password

When the user clicks on "Change Password," they will be redirected to the "Change Password" screen where they can modify their password.

To successfully change the user's password, both the new password and confirm password fields must match. The new password should be a minimum length of 8 characters and include at least one uppercase letter, one lowercase letter, one numeric character, and one special character (e.g., @, &, _, #, etc.).

After clicking "Submit," the user will receive the following message:

"Your password has been reset. You can now log in with the new password."

4.13.3 Delete Account

When the user taps on the delete account button, a pop-up message will appear with the following message: "Are you sure you want to delete your account?" The pop-up will provide two options: "Yes" and "No" buttons.

If the user taps on "Yes," their account will be deleted and they will be logged out and redirected to the login screen.

If the user taps on "No," the action will be canceled, and they will remain on the current screen.

4.13.4 Log Out

When the user taps on the log-out button, a pop-up message will appear with the following message: "Are you sure you want to log out?" The pop-up will provide two options: "Yes" and "No" buttons.

If the user taps on "Yes," they will be successfully logged out and redirected to the login screen.

If the user taps on "No," the action will be canceled, and they will remain on the current screen without logging out.

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4.14 Notifications

Whenever the Super Admin or Company Admin modifies the content of the presentations or videos, a corresponding notification will be promptly delivered to the Sales representatives as soon as they are connected to the internet.

Also the Super Admin or Company Admin will be able to send push notifications to any user.

4.15 Privacy Policy

Clicking on Privacy policy will take user to the privacy policy of the app.

4.16 User Roles for iOS/Android Table Application

This section represents the complete functional hierarchy of the tablet application, indicating all user roles present within the tablet application and the functionalities/interfaces to which each user role will have access to in the app. The Marketing Rep and Sales Director role will be assigned through Admin interfaces described in Web application Section below.

Functional Hierarchy	Marketing Representative	Sales Director
➢ Splash	✓	✓
➢ Sign In	✓	✓
• Forgot Password	✓	✓
➢ Home/Main Menu	✓	✓
• Presentation/Canvassing	✓	✓
o Our Company	✓	✓
o Presentation	✓	✓
o Presentation 2	✓	
o Marketing Home	✓	
o Warranty		✓
o Glass Package		✓
o Energy Savings	✓	✓
o Photo Gallery	✓	✓
o Presentation 3	✓	
o Testimonials	✓	✓
• Windows Sales		✓
o AI Windows		✓
o Window Selection		✓
o Energy Cost		✓
o Cart		✓

○ Side by Side		✓
○ Reveal		✓
○ Finance		✓
○ Digital Contract		✓
• Virtual Coach	✓	✓
• DIY System	✓	✓
• Record	✓	✓
• Profile Management	✓	✓
• Account Management	✓	✓
○ Change Password	✓	✓
○ Delete Account	✓	✓
○ Log Out	✓	✓
• Notifications	✓	✓
• Privacy Policy	✓	✓

5   Web Application

The overall objective of the web application is to provide Energyone and Reseller companies' management with administrative and managerial rights to oversee and manage the performance of Marketing Representatives and Sales Directors. In simpler terms, we can also describe the web application as an admin panel for the tablet application, allowing for the management of products, viewing of recordings, provision of presentation materials, management of company and user accounts, monitoring of the sales process, and access and modification of contracts and the database.

The web application will have five different user roles: Super Admin, Company Admin, Sales and Marketing Manager, Office Manager, and Human Resource.

The primary objective for the Super Admin is to create and manage all companies and users, whereas the primary objective for the Company Admin is to create and manage all users associated with their company. Therefore, the functionality to create Company accounts and create or edit products is unique to the Super Admin. However, both the Super Admin and Company Admin share the rights to provide users with presentation material, edit user accounts, manage recordings, digital contracts, and the customer database.

Company admin will also be able to create Sales, Marketing, HR and Office Manager users for them selves and all their sales and activities will be track underneath the company information.

The Sales and Marketing Manager has access to view the presentation material, the window
sales process, audio recording, digital contracts, and the customer database so that
they can stay informed about the progress of Marketing Representatives and Sales Directors.

The Office Manager has a role similar to that of the Sales and Marketing Manager but without
access to viewing presentation material.

The Human Resource role only has access to the customer database and audio recording to
monitor employee performance.

5.1   Functional Hierarchy of Web Application

- Splash
- Sign In
    - Forgot Password
- Home
    - Back-end Editing
        - Slide Replacement
        - Video Replacement
    - Presentation/Canvassing

        - Our Company
        - Presentation
        - Presentation 2
        - Marketing Home
        - Warranty
        - Glass Package
        - Side by Side
        - Energy Savings
        - Photo Gallery
        - Presentation 3
        - Testimonials

    - Company Account Creation
    - User Account Editing
    - Recordings
    - Digital Contracts
    - Product Details (Only Super Admin)

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- - - Location Entry/Editing
  - Category Entry/Editing
  - Product Entry/Editing
  - Price Percentage Factors
  - Competitor Prices
  - Sales Information
  - Financing Options

- Windows Sales

  - Window Selection
  - Energy Cost
  - Cart
  - Side by Side
  - Reveal
  - Finance
  - Digital Contract
- Customer Database
- Profile Management
- Account Management
  - Change Password
  - Delete Account
  - Log Out
- Notifications

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5.2   Functional Details of Web Application

5.3   Splash:

When the user accesses the webapp, they will be presented with a splash screen that displays Energy Ones's name and logo. This splash screen will also serve as a loading screen for the application.

5.4   Sign-In:

After the splash screen, users will be directed to a login screen where they can enter their credentials. For the initial login, users are required to input the email address and password provided to them via email from the admin. If the login credentials are correct, the user will gain access to the app. In the case of incorrect credentials, an error message will be displayed, indicating an invalid username or password.

Upon the first-time login, users will be directed to a password change screen. They will be prompted to enter their current password, create a new password, and confirm the new password. The new password must meet specific requirements, including a minimum length of 8 characters and at least one uppercase letter, one lowercase letter, one numeric character, and one special character (e.g., @, &, _, #, etc.).

Upon successfully submitting and updating the password, the user will be redirected back to the login screen to log in using their newly modified credentials.

5.5 Forgot Password:

On the Sign In screen, users will find a "Forgot Password" link. When tapped, this link will prompt the user to enter their email address. After submitting the email address, a 6-digit code will be generated and sent to the provided email address. The user will need to enter this code on the screen and submit it for authentication. Once the code is successfully authenticated, they will be redirected to a screen where they can set up a new password.

During the password setup stage, users will be prompted to create a unique and strong password. The new password must be a minimum of 8 characters long and include at least one uppercase letter, one lowercase letter, one numeric character, and one special character (e.g., @, &, _, #, etc.).

Upon successfully submitting and updating the password, the user will be redirected back to

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the login screen to log in using their newly modified credentials.

5.6 Home:

After signing in, the user will be directed to the home screen. The Home screen will feature a menu bar that includes options for account management and notifications. In addition to these functions, the home screen will serve as a central hub where each user will be presented with the modules, they have access to. The table below lists all user roles along with the modules to which each user role has access.

Super Admin	Company Admin	Sales and Marketing Manager	Office Manager	Human Resource
Backend Editing	Backend Editing	Presentation/Canvassing	Digital Contracts	Recordings
Company Account Creation	User Account Editing	Recordings	Windows Sales	Customer Database
User Account Editing	Recordings	Digital Contracts	Recording	
Recordings	Digital Contracts	Windows Sales	Customer Database	
Digital Contracts	Customer Database	Customer Database		
Product Details				
Customer Database				

5.7 Menu Bar:

The menu bar refers to a navigational component located on the screen. It will provide users with quick access to various app sections and functionalities, enabling seamless and efficient navigation. By offering a collapsible and expandable list of options, the menu bar will optimize screen space and enhances the overall user experience.

5.8 Account Management

After clicking on "Account Management," the user will be presented with the options to:

•   Profile Management
•   Change Password
•   Log Out

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5.8.1 Profile Management

After clicking on "Profile Management," the user will be presented with their profile information, including their first name, last name, email address, and contact number. Marketing representatives will have the option to edit their profile and save any changes.

5.8.2 Change Password

When the user clicks on "Change Password," they will be redirected to the "Change Password" screen where they can modify their password.

To successfully change the user's password, both the new password and confirm password fields must match. The new password should be a minimum length of 8 characters and include at least one uppercase letter, one lowercase letter, one numeric character, and one special character (e.g., @, &, _, #, etc.).

After clicking "Submit," the user will receive the following message:

"Your password has been reset. You can now log in with the new password."

5.8.3 Log Out

When the user taps on the log-out button, a pop-up message will appear with the following message: "Are you sure you want to log out?" The pop-up will provide two options: "Yes" and "No" buttons.

If the user taps on "Yes," they will be successfully logged out and redirected to the login screen.

If the user taps on "No," the action will be canceled, and they will remain on the current screen without logging out.

5.9 Notifications

The Super Admin/Company Admin will be presented with a list of all users, including their respective user roles and associated companies. The Super Admin/Company Admin will have the ability to filter users based on their user roles or associated companies. Additionally, the Super Admin can search for specific users by entering their names.

By selecting individual user(s) or all users from the list, the
Super Admin/Company can send them notifications. These notifications will be delivered to the users as soon as they connect to the internet.

Furthermore, whenever the Super Admin/Company Admin makes modifications to presentation or video content, corresponding notifications will promptly be sent to the Marketing Representative, Sales Representatives and Sales and Marketing Manager as soon as they connect to the internet.

5.10 Recordings:

The business objective of this section is to provide the management with the ability to view and listen to all the presentations which the Marketing Representatives and Sales Directors delivered to potential customers so that their performance can be evaluated. Upon selecting "Recordings," the user will be presented with a list of all the recordings made by Marketing Representatives and Sales Directors which have been uploaded to cloud along with the employee's name who made the recording, the company they are associated with, the customer's name to whom the presentation was delivered, the company and the date and time on which the recording was uploaded to cloud. The user will also able to see whether the recording was conducted live and saved to the cloud, or if it was uploaded after the session was completed due to potential internet unavailability during the session. All user with access can listen the recording. If the user is a Super Admin or Company Admin, they may also upload/download or delete a recording.

5.11 Customer Database:

This interface allows the user to access the Customer Database. They will be presented with a list of all existing customers, including the following details for each:

- First Name
- Last Name
- Email Address
- Phone Number
- Address
- City
- State/Province

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The user will also have the option to modify these details for
any existing customer, as well as the option to add a new customer.

For all customers who have been provided with an estimate, there will be a "View Estimate"
button next to their name. The user can click on it to view the estimates that were given to that
user, along with the quoted price.

Following are the features that will be specific to each role in the system.

5.12 Super Admin

5.13 Back-End Editing:

The business objective of this module is to manage the Slides and Videos which the Marketing
Representatives and Sales Directors would use to convince customers to make a purchase.
Once the user selects "Back-End Editing" from the home screen, they will be presented with the
following options:

- Slide Replacement
- Video Replacement

5.13.1 Slide Replacement:

Upon selecting "Slide Replacement," the user will be presented with a list of the following
modules:

- Our Company
- Presentation
- Presentation 2
- Marketing Home
- Warranty
- Glass Package
- Energy Savings
- Photo Gallery
- Presentation 3
- Testimonials
- Side by Side
- Financing Options

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The user can then view all the Static Images which have been uploaded as slides for that particular module. The user will have the ability to define the order in which each slide will appear. user can also delete any existing images and upload new images.

5.13.2 Video Replacement:

Upon selecting "Video Replacement," the user will be presented with a list of the following modules:

- Our Company
- Presentation
- Presentation 2
- Marketing Home
- Warranty
- Glass Package
- Energy Savings
- Photo Gallery
- Presentation 3
- Testimonials
- Side by Side
- Financing Options

The user can then view all videos uploaded in that module. They will have the ability to upload new videos or remove previously uploaded videos.

5.14 Company Account Creation:

Company accounts are basically resellers that are selling energyone products. The reseller companies follow a dealership model selling EnergyOne windows. Upon selecting this Interface, the user will be presented with a list of all existing Resellers along with name of the company's admin and the date when the company was created. The Super Admin may search for any company by typing its name in the search bar. The user will have the option to create a new Company Account and edit, suspend or delete any existing Company Account. Once the user chooses to create a new Company Account or edit an existing Company Account, they will be required to fill out the following information:

Note: This feature of creating company(Resellers) will be only be available to Super Admin.

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- Company Name (The user can add the name of the company)
- Company Description (The user can add basic description about the company)
- Company Logo (The user can upload the logo of the company which will be the logo for all user profiles associated with that company)
- Basic Color Theme (The user will have the option to choose a basic color theme from the given options (The user may choose a different logo, color theme for each company. Choosing a color theme will change the color for basic components such as Header and Footer)
- Address (The user can add the address of the company)
- Phone (The user can add the phone number for the company, this phone number will also be associated with the Company Admin profile which will automatically be created at the time of creation of company)
- Admin First Name (Admin)
- Admin Last Name
- Admin Email (The user can add the email address. This email address will also be associated with the Company Admin profile which will automatically be created at the time of creation of company. This email address will automatically be verified as the company admin user would need to log in using the credentials sent on their email)

Once the company is created. The company admin will be able to login and create user accounts. Each company would only have one Company Admin and can't create another Company Admin.

5.15 User Account Creation:

The business objective of this module is to create new user accounts or modify existing user accounts that belongs to company admin. They can create user accounts for all other user types. Upon choosing "User Account Creation", the admin user will be presented with a list of all existing users along with their user role and the company with which their account is associated. The admin user may search for any particular user by typing their name in search or filtering out the results based on associated company. The user may create a New User Account or Edit, Suspend or Delete an existing account. If the user chooses the create a New User Account or Edit an Existing account, they will be required to fill out the following information:

Note: This feature is only available to Company Admin.

- First Name
- Last Name

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- Email Address of User
- Password of User
- Retype Password of User
- Account Type/User Profile/User Role

5.16 Digital Contracts:

The business objective of this section is to keep record of all contracts under one place. Also the Super Admin will be able to view all contracts entered by each reseller company. By clicking on Digital Contracts, the user will be presented with all the digital contracts along with the date they were uploaded, the company whose representative uploaded the document and the customer with whom the contract was signed. All users with access can upload/download the contract. Only super admin can delete a contract.
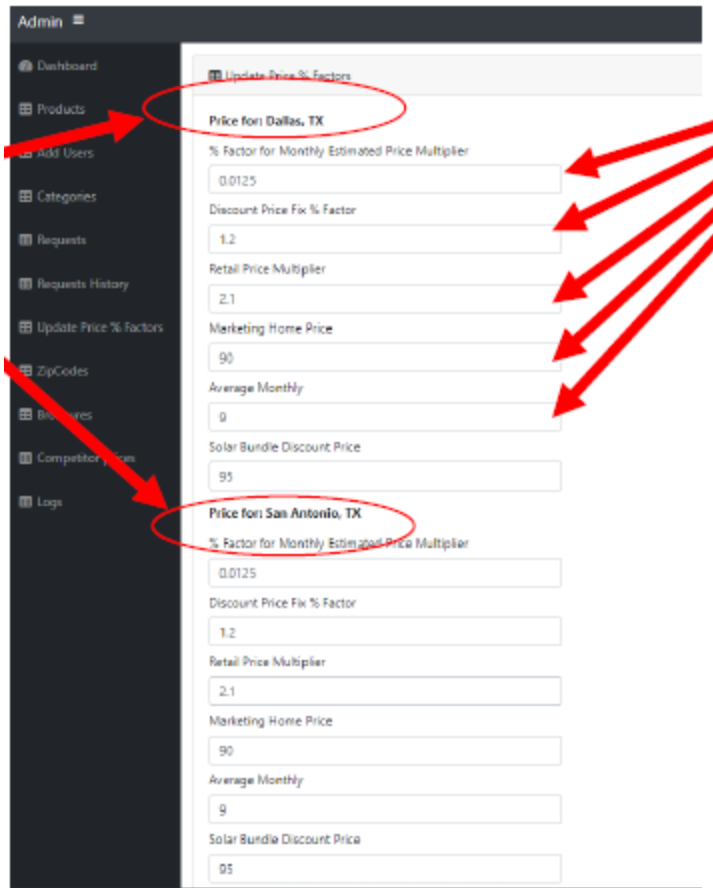
5.17 Product Details

The business objective of this module is to allow Super Admin to add products, define the category under which each product falls, define the locations where each product will be available, define the price of each products along with the price for competing products and showcase payment options such as QR code through informative slides/videos.

5.17.1 Location Entry/Editing:

When selecting "Location Entry/Editing," the user will encounter an array of all currently established cities where the products are available for purchase. Each entry in the list will encompass the city's name, an accompanying image of the city, the respective company's brochure for that city, and a contact phone number for connecting with the company in that specific city. The user will retain the choice to append new cities or amend/delete existing ones. Upon the users decision to modify an existing city or establish a new one, they will be obligated to complete the subsequent fields:

- City Name (Text Box)
- Phone Number (Text Box)
- City Image (Upload)
- Brochure for that City (Upload)

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5.17.1.1 Price Percentage Factors:

This screen allows the admin to access and edit price factors that will allow the company to supply information for the Price Reveal modules. There needs to be a section added for each city when one is created by the user. Each section will have the following fields:

- %Factor for Monthly Estimated Price Multiplier
- Discount Price Fix % Factor
- Retail Price Multiplier
- Marketing Home Price
- Average Monthly
- Solar Bundle Discount Price

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Based on the price factors added by the admin, the price for Reveal modules will be calculated using the following formula which will be hard coded in the backend.

Totalprice=Grid_price+withoutgridprice+doorwithgrid_price+doorgridprice;

Retailfactor=RetailPriceMultiplier(VALUEFROMADMIN)

Homeprice=MarketingHomePrice(VALUEFROMADMIN)

(totalpricehomeprice)/100)retail_factor

Monthly Price

Factor=FactorforMonthlyEstimatedPriceMultiplier(VALUEFROMADMIN)

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==(totalprice*homeprice)/100)retailfactor*factor==

==Note: Discuss the formula with client==.

5.17.2 Category Entry/Editing:

The business objective of this section is to provide Super Admin with the ability to categories each product into a category which will help with setting pricing. For eg. Square is a category. The Super Admin will set a universal price for all windows which fall under square category. When accessing "Category Entry/Editing," the user will encounter a comprehensive list of all prevailing categories, accompanied by their respective creation dates. The user will possess the capability to introduce a fresh category or modify/remove pre-existing ones. Upon the user's selection to amend an existing category or establish a new one, they will be compelled to furnish the ensuing particulars:

- Category Name (Text Box)
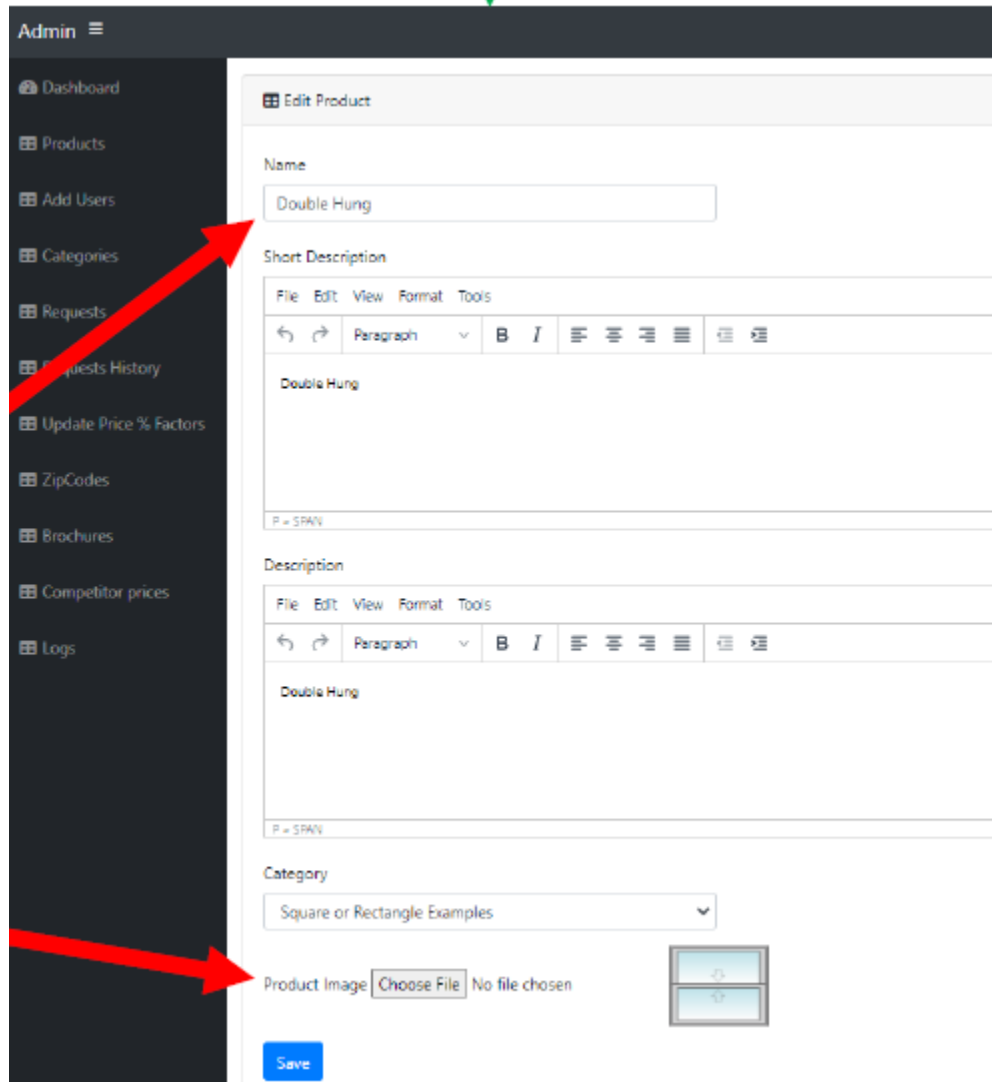- Price without Grid (Text Box)
- Price with Grid (Text Box)

The user must furnish prices (both with and without the grid) for all Locations (cities) where this particular product category is available for purchase. Prices stated here will be used in the backend algorithm to help calculate the price for Reveal module.

5.17.3 Product Entry/Editing:

When clicking on "Product Entry/Editing," the user will be presented with a list of all existing products, along with the creation dates. The user will have the option to add a new product or edit/delete existing products. When the user clicks to edit an existing product or create a new product, they must complete the following fields:

- Name (Text Box)*
- Short Description (Text Box)*
- Long Description (Text Box)*
- Select a Category (Drop Down)*
- Product Image (Upload Image)*

Note: * indicates that the field is required/mandatory

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5.17.4 Competitor Prices:

This interface enables the admin to access and modify price factors, facilitating the company in providing information for the Competitor Pricing modules. The interface will display a list of names of all previously added competitors, alongside the prices previously entered for the following categories:

- Square
- Not Square
- Panel 1
- Panel 2

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- Panel 3

By selecting "edit" for a specific competitor, the user can then adjust the competitor's name or update prices for each individual category. The user may also create a new competitor by clicking on the button "Add Competitor".

Competitor pricing screen.

5.17.4.1 Add Competitor

- If the user clicks on Add Competitor, they will be presented with a screen where they will be required to add the:
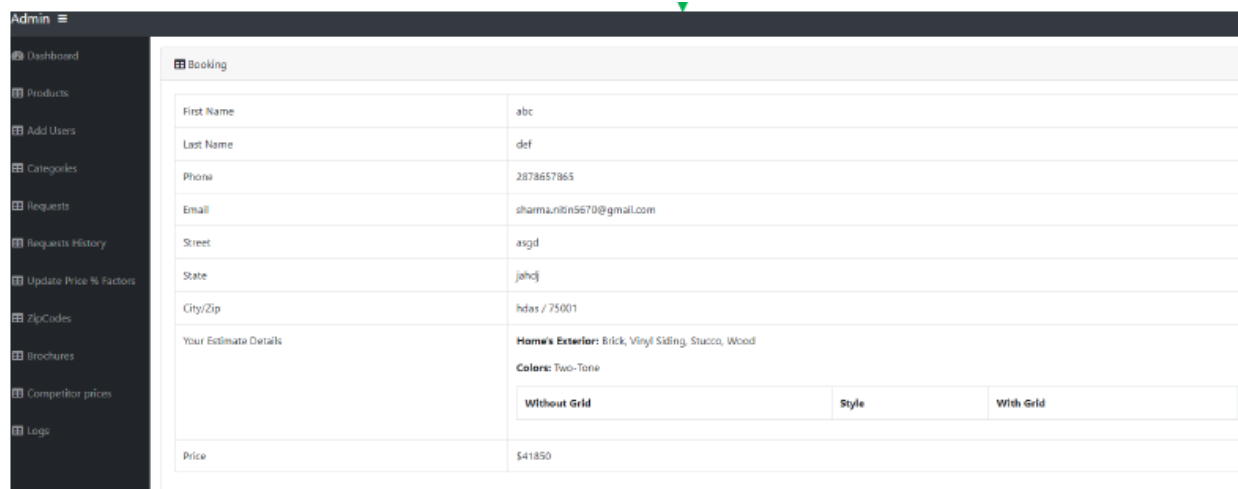

- Competitor's name

    Competitor's prices for:

- Square
- Not Square
- Panel 1
- Panel 2
- Panel 3

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5.17.5 Sales Information

By clicking on Sales Information user will be shown the following details for all customers to whom a sale was made: Name, Phone Number, Date Created, Estimate, Price. The super admin will also have the option to create new, delete or edit the records for any particular sale. The following fields will be required for each sale when creating or editing them:

- First Name
- Last Name
- Phone
- Email
- Street
- State
- City/Zip
- Estimate Details
- Price

5.18 Company Admin

The Company Admin is role is assigned to the user whose email address is used at the time of company creation. They have supreme access over all users associated with their particular company. Company Admin has access to all general functionalities and Back End Editing, User Account Editing and Digital Contracts.

5.19 Backend Editing

Please refer to section 5.13 for a detailed description on backend Editing. However, Company Admin will be only able to view his company data and information and will not be able to see any other companies' information.

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5.20. User Account Editing

Please refer to section 5.15 for a detailed description on backend Editing. However, Company Admin will be only able to view his company data and information and will not be able to see any other companies' information.

5.21. Digital Contracts

Please refer to section 5.16 for a detailed description on backend Editing. However, Company Admin will be only able to view his company data and information and will not be able to see any other companies' information.

5.22 Sales & Marketing Representative

5.23. Presentation

The business objective for this section to provide the user with the capability to present slides/videos to potential customers. Once the user clicks on Presentation/Canvassing, they will be presented with the following modules to select from:

- Our Company
- Presentation
- Presentation 2
- Marketing Home
- Warranty
- Glass Package
- Energy Savings
- Photo Gallery
- Presentation 3
- Testimonials

Upon selecting any module other than "Presentation", the user will be shown a new interface housing two folders: "Presentation" and "Video."

After selecting the "Presentation" folder, the user will navigate seamlessly through static images using "Next" and "Previous" buttons, with a sliding transition effect between each image. The user will also have the option to download these images so that they may present them when they are not connected to the internet. The images in this folder will be uploaded

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by the Super Admin or Company Admin who will also define the sequence in which these images will be presented.

After selecting the "Videos" folder, the user can easily select and play any of the videos. The user will also have the option to download these videos so that they may present them when they are not connected to the internet. These videos will also be uploaded by the Super Admin or Company Admin.

When the user selects the module for "Presentation", the user will directly be taken to the "Presentation" folder where they will navigate seamlessly through static images using "Next" and "Previous" buttons, with a sliding transition effect between each image. The user will also have the option to download these images so that they may present them when they are not connected to the internet. The images in this folder will be uploaded by the Super Admin or Company Admin who will also define the sequence in which these images will be presented.
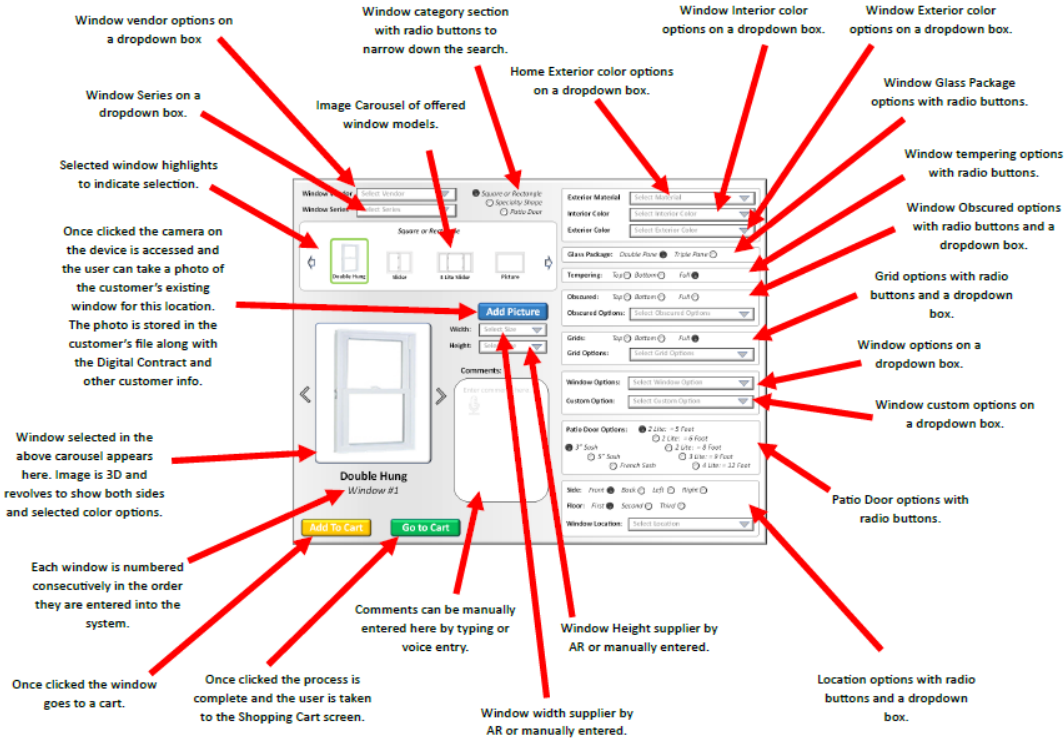
5.24 Windows Sales:

The objective of this module is to lock a sale. Once the user selects Windows Sales from the Home screen, they will be presented with the following options:

- Windows Sales
- Energy Cost
- Cart
- Side by Side
- Reveal
- Financing
- Digital Contract

5.24.1. Windows Sales:

Upon selecting Windows Sales, the user will be presented with the following screen where they can select a product:

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Window vendor options on a dropdown box

Window Series on a dropdown box.

Selected window highlights to indicate selection.

Once clicked the camera on the device is accessed and the user can take a photo of the customer's existing window for this location. The photo is stored in the customer's file along with the Digital Contract and other customer info.

Window selected in the above carousel appears here. Image is 3D and revolves to show both sides and selected color options.

Each window is numbered consecutively in the order they are entered into the system.

Once clicked the window goes to a cart.

Once clicked the process is complete and the user is taken to the Shopping Cart screen.

Comments can be manually entered here by typing or voice entry.

Window width supplier by AR or manually entered.

Window Height supplier by AR or manually entered.

Window category section with radio buttons to narrow down the search.

Image Carousel of offered window models.

Home Exterior color options on a dropdown box.

Window Interior color options on a dropdown box.

Window Exterior color options on a dropdown box.

Window Glass Package options with radio buttons.

Window tempering options with radio buttons.

Window Obscured options with radio buttons and a dropdown box.

Grid options with radio buttons and a dropdown box.

Window options on a dropdown box.

Window custom options on a dropdown box.

Patio Door options with radio buttons.

Location options with radio buttons and a dropdown box.

Double Hung
Window #1

Add Picture
Add To Cart
Go to Cart

Exterior Material
Interior Color
Exterior Color
Glass Package
Tempering
Obscured
Obscured Options:
Grids
Grid Options:
Window Options:
Custom Option:
Patio Door Options:
Side:
Floor:
Window Location:

Note: Client will provide a list to populate each of the dropdown boxes

Further details about each field of this screen are mentioned below:

Window Vendor Box Features: The app will provide a range of vendor options for selection, with the flexibility to edit the vendor list on the backend. Each vendor will present its own series offerings. Once chosen, this selection will persist throughout window choices and cart additions unless manually modified by the user. Energy One will supply the list of vendors, making this a mandatory field in the process.

Window Series Box Features: The window Series are specific to each vendor and encompass all available window options. Within each Series, there will be a comprehensive list of products, along with their corresponding options and prices. This encompasses color choices, grid patterns, size restrictions, and window types. The chosen Series will populate the image carousel at the screen's top and dictate color, size, and grid options. Each Series option will come with editable prices on the backend and will be reflected in the Digital Contract post-purchase. Once chosen, this selection will remain effective throughout window choices and cart additions, unless manually adjusted by the user. Energy One will provide the list of relevant series, making this a mandatory field in the process.

Product Carousel Features: The carousel section will be inactive and grayed out until both the Window Vendor and Window Series are selected. Once a vendor is chosen from the dropdown boxes, the carousel will populate with relevant options and become interactive. All options will be specific to the chosen vendor and Series. The Product Carousel will showcase available window and patio door images from the selected vendor, each accompanied by a product name at the bottom. Users will have controls to scroll through the available options, and selecting a product will highlight it. The chosen product will then appear in the product presentation window located below the carousel.

Product Presentation Window Features: A product chosen from the product carousel will appear in the product presentation window. This space will remain empty if no product is selected. The image displayed here will be a 3D rendering of the product, capable of a 360° rotation to showcase all angles, if possible. The image will dynamically change colors according to the user's selections, with the ability to display distinct interior and exterior colors when applicable. Furthermore, the image will accurately reflect selected grid options when applied.

Window Style Box Features: The window Style Box options are specific to the chosen vendor and window series. These style choices can be accessed through a dropdown box. When a style option is selected, it will alter the appearance of the window currently displayed in the Product Presentation Window. Different styles can also influence the window's price. All chosen styles and resulting price changes will be accurately represented in both the digital contract and the shopping cart. This style selection will only apply to the ongoing window selection and should reset to a default blank field once the window is added to the cart. Energy One will provide the list of relevant styles, making this a mandatory field in the process.

House Exterior Color Box Features: The House Exterior Color Box options are specific to the chosen vendor and window series. These exterior color choices can be accessed through a dropdown box. The selected colors can influence the window's price. All House Exterior color selections and resulting price changes will be accurately reflected in both the digital contract and the shopping cart. Once chosen, this color option will apply to all window selections and cart additions, unless manually modified by the user. Energy One will provide the list of relevant colors, making this a mandatory field in the process.

Window Interior Color Box Features: The window Interior Color Box options are specific to the chosen vendor and window series. These interior color selections can be accessed via a dropdown box. Upon selecting a color option, it will alter the color of the window currently

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displayed in the Product Presentation Window. Chosen colors
can have an impact on the window's price. All color selections and resulting price adjustments will be accurately recorded in both the digital contract and the shopping cart. Once chosen, this color option will persist throughout window selections and cart additions, unless manually modified by the user. Energy One will provide the list of applicable colors, making this a mandatory field in the process.

Window Exterior Color Box options: The window Exterior Color Box options are specific to the chosen vendor and window series. These exterior color choices can be accessed through a dropdown box. Upon selecting a color option, it will modify the color of the window currently shown in the Product Presentation Window. Chosen colors can impact the window's price. All color selections and resulting price variations must be accurately represented in both the digital contract and the shopping cart. Once chosen, this color option will remain effective for all window selections and cart additions, unless manually altered by the user. Energy One will supply the list of relevant colors, making this a mandatory field in the process.

Window Glass Package Box Features: The window Glass Package Box options are specific to the chosen vendor and window series. These Glass Package choices are available through radio buttons. The selected Glass Package will influence the window's price. All Glass Package selections and resulting price variations must be accurately shown in both the digital contract and the shopping cart. Energy One will provide the list of applicable Glass Packages, making this a mandatory field in the process.

Window Tempering Box Features: The Window Tempering Box options are tailored to the chosen vendor and window series. These Tempering choices can be selected using radio buttons. The chosen Tempering option will influence the window's price. All Tempering selections and resulting price variations must be accurately represented in both the digital contract and the shopping cart. It's important to note that the Window Tempering Box will not alter the image displayed in the Product Presentation Window. Energy One will provide the list of relevant Tempering options, making this a mandatory field in the process.

Obscured Box Features: The Obscured Box options are specific to the chosen vendor and window series. Obscured choices can be made using both radio buttons and a dropdown box. The selected Obscured option will impact the window's price. All Obscured selections and resulting price variations must be accurately recorded in both the digital contract and the shopping cart. It's important to note that the Obscured Box will not alter the image displayed in

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the Product Presentation Window. Energy One will provide the
list of relevant Obscured options, making this a mandatory field in the process.

Window Grid Options Box Features: The window Grid Options Box is tailored to the selected vendor and window series. Grid options can be chosen using radio buttons and a dropdown box that should show graphic images of each available grid style. Any selected grid options will be applied to the window showcased in the Product Presentation Window. Certain grid options may be applicable to specific sections of particular window types. All Grid selections and associated price variations must be accurately captured in both the digital contract and the shopping cart. Energy One will provide the list of relevant options.

Window Options Box Features: The Options Box is designed for requesting custom services provided by Energy One. These options can be accessed through a dropdown box. Chosen options will have an impact on the window's price. All option selections and resulting price adjustments must be accurately displayed in both the digital contract and the shopping cart. Energy One will supply the list of applicable options for selection.

Window Custom Options Box Features: The Custom Options Box is intended for requesting specific custom services provided by Energy One. These options can be chosen from a dropdown box. Selected custom options will influence the window's price. All chosen custom options and resulting price adjustments must be accurately included in both the digital contract and the shopping cart. Energy One will provide a list of applicable custom options for users to select from.

Add Picture Button Features: The Add Picture button facilitates connecting to the device's camera to capture a photo of a customer's existing window. Upon selecting the Add Picture button and taking a photo, it is stored and linked to the previously chosen "Location" option by the user. If no "Location" has been selected, a notification prompts the user to choose a location first. Added photos are integrated with other customer data and associated with it. Whenever the Add Picture button is clicked to attach a photo to a customer's information, authorized profiles can access these photos via the website portal. The maximum size of the picture would be 3mb and it would be in JPEG format.

Window Width Box Features: The window Width Box options are tailored to the chosen vendor and window series. Width options can be chosen using a dropdown box. The selected widths will influence the window's price. All width selections and resulting price variations must be

accurately displayed in both the digital contract and the
shopping cart. Energy One will provide the list of relevant sizes, making this a mandatory field in the process.

Window Height Box Features: The window Height Box options are customized to the chosen vendor and window series. Height options can be selected using a dropdown box. The chosen heights will influence the window's price. All height selections and resulting price variations must be accurately represented in both the digital contract and the shopping cart. Energy One will provide the list of relevant sizes, making this a mandatory field in the process.

Comments Box Features: The Comments Box is designed for adding notes regarding the window shown in the Product Presentation window. All comments entered will be accurately included in the digital contract and will appear alongside the corresponding window selection. Users have the flexibility to input comments either through typing or voice commands.

Add To Cart Button Features: The Add To Cart button serves as the final step in confirming the individual window and options selection process. When this button is clicked, all window details are recorded in a database, generating an item in the cart. Additionally, selecting the Add To Cart button restores the Window Selection page to its default settings. Upon clicking the button, a notification window appears, confirming the successful addition of requested windows to the cart and offering the user the option to proceed to the Checkout section of the program.
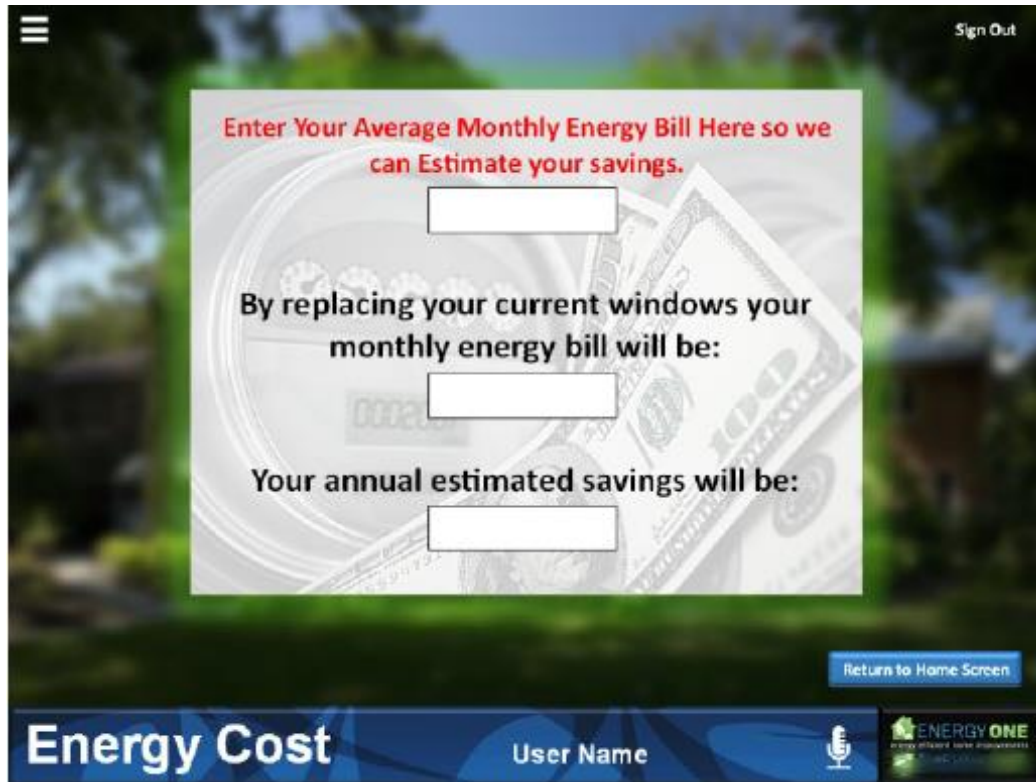
Go to Cart Button Features: Upon selecting the Go to Cart button, all information regarding the window and option selections is entered into a database, generating the Digital Contract. Additionally, clicking the Go to Cart button records window details in the database, creating the Competitor Price Comparison Screen, which calculates our price against that of our competitor. This button also restores the Window Selection page to its default settings. The Go to Cart button's purpose is to navigate to the Cart screen for further proceedings.

Patio Door Options Box Features: The Patio Door Options Box presents various choices for the offered Patio Doors. These options can be selected through radio buttons and a dropdown box. The selected Patio Door Options will influence the window's price. Energy One will provide the list of relevant Patio Door Options. All chosen Patio Door selections and related price adjustments must be accurately recorded in both the digital contract and the shopping cart. This is a mandatory field if a Patio Door has been selected in the previous steps.

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Window Location Box Features: The Window Location Box options pertain to the position within the house where the window is intended to be installed. These location options can be chosen using radio buttons and a dropdown box. Energy One will provide the list of relevant location options. This feature will also connect with any photos taken for each selected location by using the "Add Photo" button. This is a mandatory field. The maximum size of the image would be 3mb and it would be in JPEG format.

5.24.2 Energy Cost

Upon selecting "Energy Cost", user will be presented with the following screen:

Upon entering the customer's Average Monthly Energy Bill, the user will be shown the customer's anticipated monthly energy bill after replacing their existing windows. This outcome, calculated using the formula which will be coded in backend, will also include the projected annual savings that the customer can expect.

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5.24.3. Cart

Upon selecting "Cart", the user will be presented with the following screen which will show the products currently in their cart.
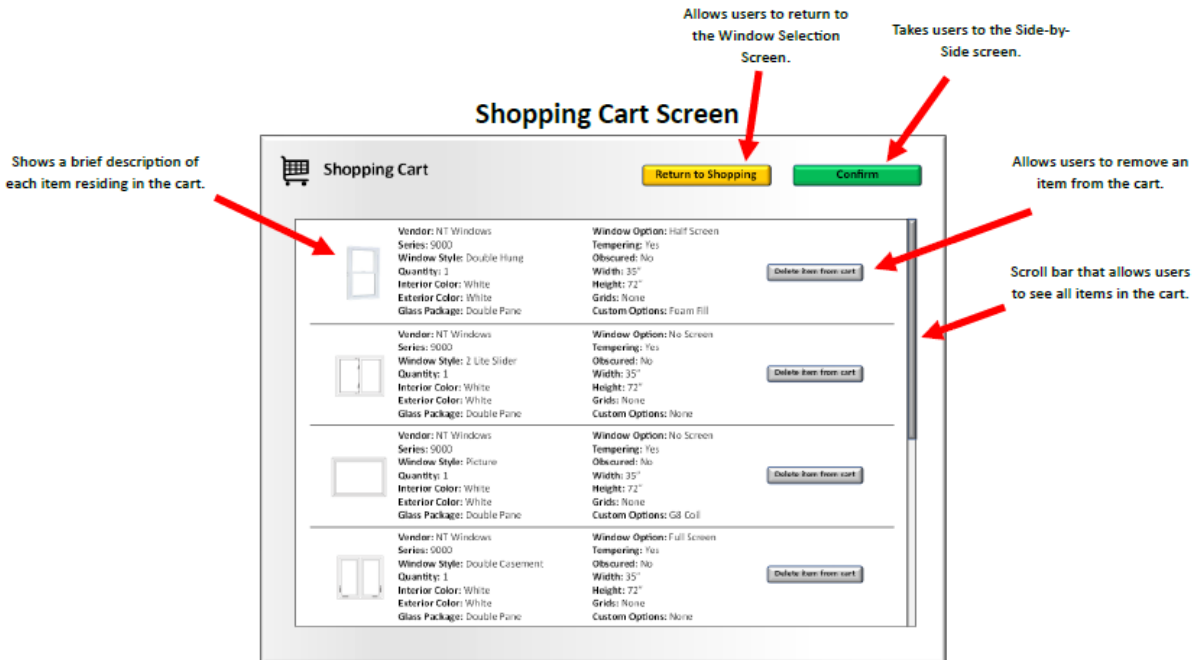
Information from "Window Selection" will automatically be populated in the Shopping Cart screen.
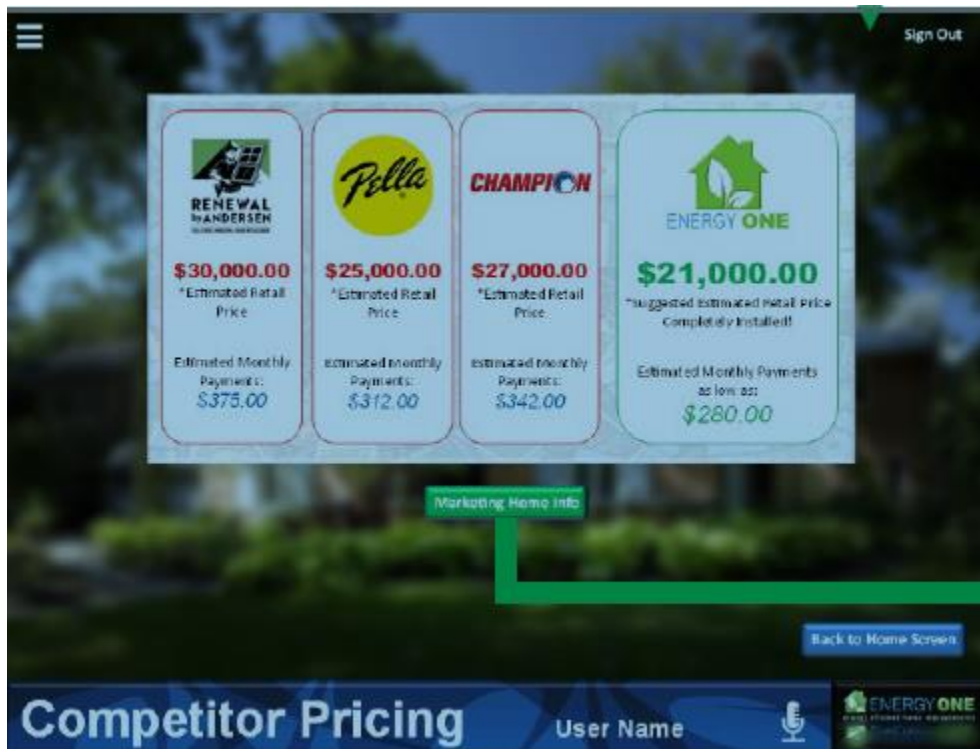
5.24.4 Side by Side:

This is a presentation module which will present slides/videos. Upon selecting "Side by Side" the user will be shown a new interface housing two folders: "Presentation" and "Video."

After selecting the "Presentation" folder, the user will navigate seamlessly through static images using "Next" and "Previous" buttons, with a sliding transition effect between each image. The user will also have the option to download these images so that they may present them when they are not connected to the internet. The images in this folder will be uploaded by the Super Admin or Company Admin who will also define the sequence in which these images will be presented.
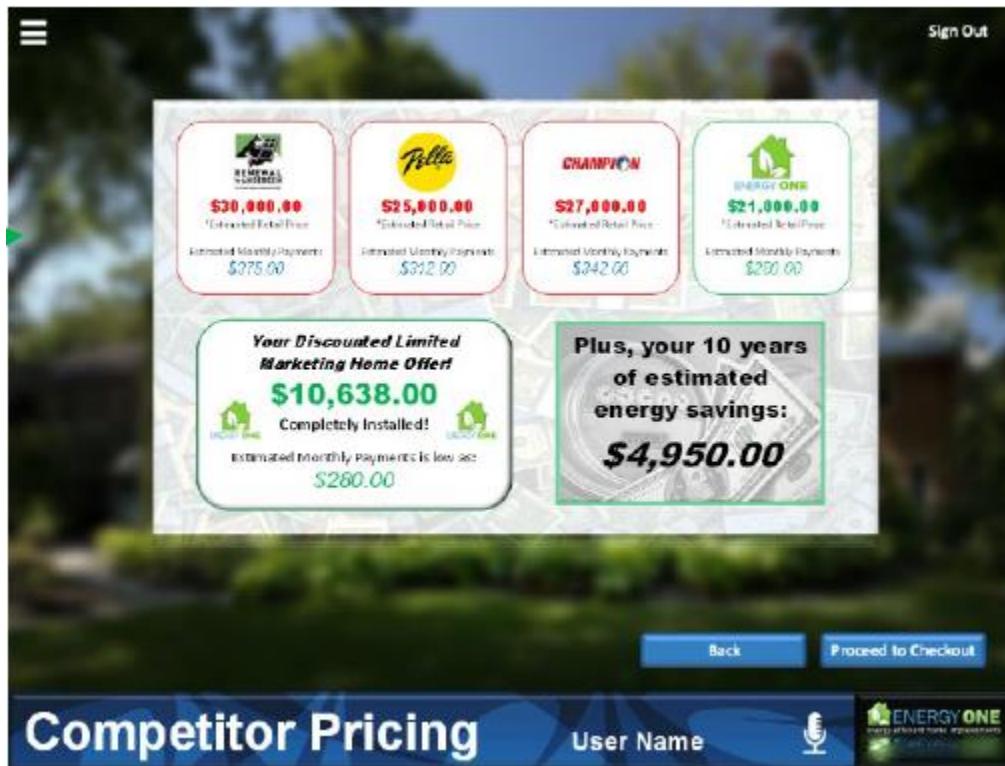
After selecting the "Videos" folder, the user can easily select
and play any of the videos. The user will also have the option to download these videos so that
they may present them when they are not connected to the internet. These videos will also be
uploaded by the Super Admin or Company Admin.

5.24.5 Reveal

Information previously entered by the user in Window Selection, Cart, and the Energy Cost
module, will be transmitted to the Reveal module. Utilizing the formula coded in backend, the
Price Reveal Screen will then furnish the user with not only Energy One's price but also
competitor prices. Additionally, a button within the Price Reveal Screen will enable the user to
easily navigate to the Marketing Home screen.

Upon accessing the Marketing Home Screen, the user will encounter a display featuring
competitor prices, Energy One's standard price, and the discounted Energy One price.
Furthermore, the user will be provided with a projection of the customer's estimated savings
over a 10-year period should they opt to purchase windows from Energy One.
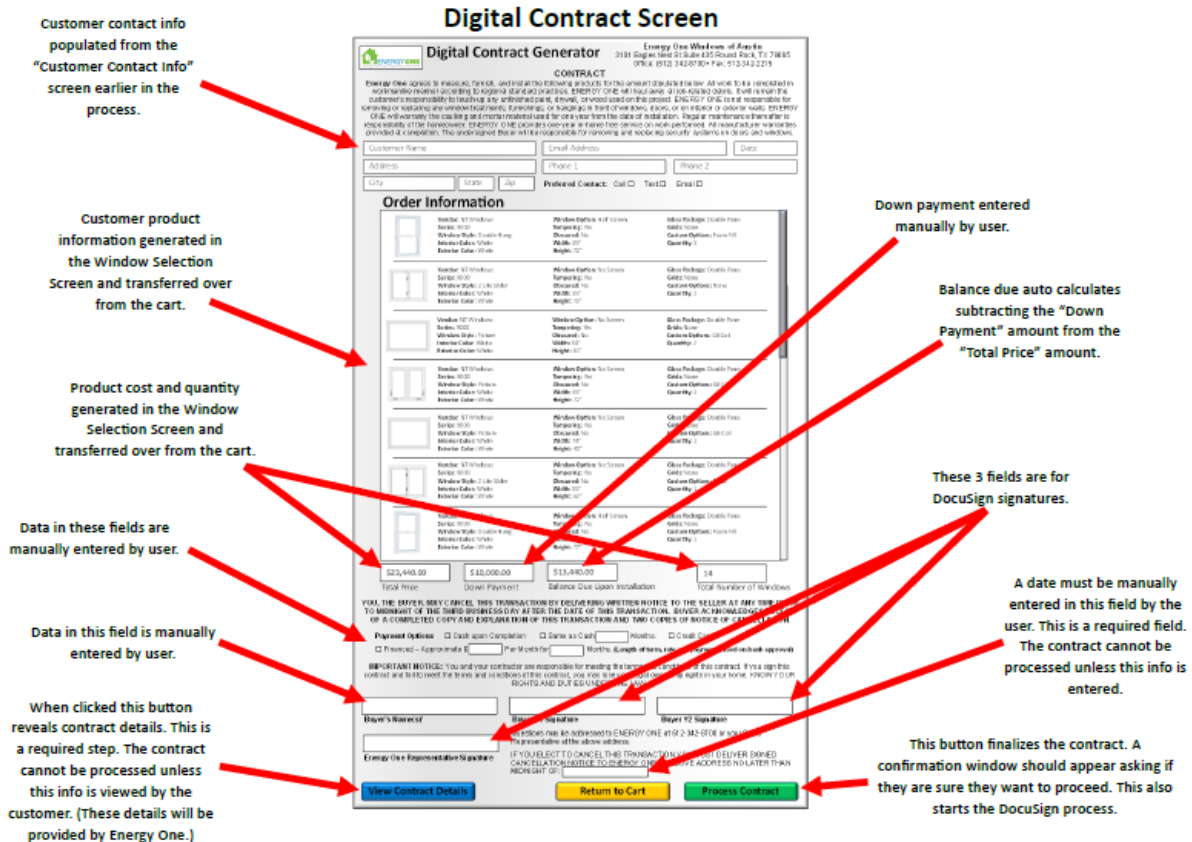
5.24.6. Financing

This is a presentation module which will allow the user to view slides/videos presenting the potential payment options. Upon selecting "Financing the user will be shown a new interface housing two folders: "Presentation" and "Video."

After selecting the "Presentation" folder, the user will navigate seamlessly through static images using "Next" and "Previous" buttons, with a sliding transition effect between each image. The user will also have the option to download these images so that they may present them when they are not connected to the internet. The images in this folder will be uploaded by the Super Admin or Company Admin who will also define the sequence in which these images will be presented.

After selecting the "Videos" folder, the user can easily select and play any of the videos. The user will also have the option to download these videos so that they may present them when they are not connected to the internet. These videos will also be uploaded by the Super Admin or Company Admin.

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5.24.7. Digital Contract

The objective of this section is to lock a sale by signing the contract. Upon selecting "Digital Contract", the user will be presented with the following screen:

This module effectively combines information from "Customer Database," "Window Selection," and the "Cart," automatically populating the "Digital Contracts" section. The user will manually complete the remaining fields. The contract's electronic signing function will resemble that of Docusign or Echosign, ensuring swift validation. We have the option to integrate the paid APK for Docusign or Echosign, if supplied by the client.

5.25 Digital Contracts

Please refer to section 5.16 for a detailed description on backend Editing. However, Sales and Marketing Manager will be only able to view his company data and information and will not be able to see any other companies' information.

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5.26 Office Manager

5.27 Window Sales

The office manager would only have access to the following sections of windows sales:

- Windows Sales
- Cart
- Financing

Please refer to 5.24.1, 5.24.3 and 5.24.6

5.28 Digital Contracts

Please refer to section 5.16 for a detailed description on backend Editing. However, Office Manager will be only able to view his company data and information and will not be able to see any other companies' information.

5.29 Human Resource

Only common screens

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5.30. Application Profiles and Access for Web Application

Following are all the application profiles and their associated features/interfaces that will be used in the app.

Functional Hierarchy	Super Admin	Company Admin (Permissions for associated company only)	Sales and Marketing Manager (Permissions for associated company only)	Office Manager (Permissions for associated company only)	Human Resource (Permissions for associated company only)
➢ Splash	✓	✓	✓	✓	✓
➢ Sign In	✓	✓	✓	✓	✓
• Forgot Password	✓	✓	✓	✓	✓
➢ Home	✓	✓	✓	✓	✓
• Back-end Editing	✓	✓			
o Slide Replacement	✓	✓			
o Video Replacement	✓	✓			✓
• Presentation/Canvassing			✓		
o Our Company			✓		
o Presentation			✓		
o Presentation 2			✓		
o Marketing Home			✓		
o Warranty			✓		
o Glass Package			✓		

o Energy Savings			✓		
o Photo Gallery			✓		
o Presentation 3			✓		
o Testimonials			✓		
• Company Account Creation	✓				
• User Account Editing	✓	✓			
• Recordings	✓	✓	✓		
• Digital Contracts	✓	✓	✓	✓	✓
• Product Details	✓				
o Location	✓				
o Category Entry/Editing	✓				
o Product Entry/Editing	✓				
o Entry/Editing	✓				
o Price Percentage Factors	✓				
o Competitor Prices	✓				
o Sales Information	✓				
o Financing Options	✓				
• Windows Sales			✓	✓	
o Window Selection			✓	✓	
o Energy Cost			✓		
o Cart			✓	✓	

	Col1	Col2	Col3	Col4	Col5
○ Side by Side			✓		
○ Reveal			✓		
○ Finance			✓	✓	
○ Digital Contract			✓		
• Customer Database	✓	✓	✓	✓	✓
• Generate Reports	✓				
○ Company Admins	✓				
○ Sales Directors	✓				
○ Sales & Marketing Managers	✓				
○ Marketing Representatives	✓				
○ Office Managers	✓				
○ Human Resources	✓				
○ Customers	✓				
○ Digital Contracts	✓				
○ Sales	✓				
○ Products	✓				
• Profile Management		✓	✓	✓	✓
• Account Management	✓	✓	✓	✓	✓
○ Change Password	✓	✓	✓	✓	✓
○ Delete Account	✓	✓	✓	✓	✓
○ Log Out	✓	✓	✓	✓	✓
• Notifications	✓	✓	✓	✓	✓

6. Operating Systems

6.1. Tools and Operating Systems

- Analytics: Firebase analytics for the application
- Design Tools for Tablet App: Adobe XD/Figma
- Development Tools for Tablet App: React Native
- Backend: php/.net
- Hosting: AWS Managed Stack
- Database: Amazon RDS for my SQL

6.2. Operating System & Limitations for Tablet App

The application will be developed with the following:

- Portrait mode
- Android & Apple Tablet only
- iOS: 12 and above
- Android: 10 and above
- Screen Size: 5 inches and above

7. Roles and Responsibility

This section describes the roles and responsibilities that must be fulfilled for successful implementation of the project.

7.1. Customer's Responsibilities

The customer will be responsible for the following activities:

- Availability during all phases, especially during development & execution
- Timely approval of all relevant documents, designs & builds
- Hosting infrastructure, Apple & Play Store account

7.2. App Maisters Responsibilities

App Maisters will be responsible for the following activities: -

- Implementation of the proposed solution.
- Availability of resources as per the project plan
- Documentation of the project

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Phase	Team
Requirement Analysis/ Scope Finalization	Business Analyst/Project Manager
Design Phase	Business Analyst/Project Manager UI Team
Development Phase	Project Manager Development Team QA Team IT Department
Quality Assurance Phase	Project Manager QA Team Development Team IT Team
Support	Project Manager Support Team IT Department

App Maisters will assign the following team from their end during the mentioned phases.

7.3. Deliverables

The following deliverables will be provided by App Maisters which will be considered as a Sign Off:

- Fully functional & tested application

7.4. Assumptions

Following assumptions are taken into consideration during the preparation of this proposal:

- Client will actively participate during all phases.
- This document comprises of all the functional specifications which are agreed upon between the client & App Maisters. Any additional features or changes to the scope will be handled through the Change Request process. Time and cost effect of these changes will be agreed mutually between both the parties.
- If the app requires server-side hosting, then the Client will be responsible for setting up the server or purchasing the hosting.
- If the app requires the use of a chatting or notification feature, the client will need to provide Firebase paid account.

- Estimated effort calculation is based on 8 hours per day and 40 hours (about 1 and a half days) per week.
- The client will nominate one key person (either another person or himself) to act as the executive sponsor and would serve as the main liaison point between the two parties. This will provide App Maisters with the opportunity to communicate issues and concerns that may affect the success of the project to a decision maker and hence facilitate swift corrective action where necessary.
- Client will provide feedback to questions raised by App Maisters project team to draft documents submitted for review. Any decisions that need to be taken must not be delayed more than three business days. Any further delay in providing such feedback will result in a corresponding delay in the project timeline.
- It is assumed that all milestones and deliverables will be signed off in a timely way by the client. Client will respond within a mutually agreed timeframe of receipt of written notice with respect to the acceptance of key deliverable. This timeframe is assumed to be three business days.
- The system will be developed with US English interface only.
- In performing our services, we will rely upon any instructions, authorizations, approvals or other information provided to us by the client.
- The Designs of the application will be as per the information provided by the client in Design Requirement Document (DRD).
- Upon signing off of the DRD, any changes requested in designs will be treated as a Change Request.
- App Maisters will provide a complete walk through to the client once the project is in beta phase.
- App Maisters will make the app work in general. App Maisters will not be responsible if the app does not show desired behavior on any specific device.
- Store Credentials (Apple & Google Store) will be provided by the Client.
- Furthermore, App Maisters would not be responsible if iTunes or Google Play Store rejects the app on submission for any other reason or functionality which is not described in the SOW.

7.5. Warranty and Postproduction Support

- App Maisters will provide a warranty of **30 Days** once the application is successfully submitted and becomes live.
- The App will be under support agreement after the warranty period is over. For this a separate Annual Maintenance Contract (AMC) is to be signed between the two parties.
- App Maisters will make available via email, telephone or cell number, 5 working days per week, and 8 hours per day, excluding general and local public holidays, individuals sufficiently skilled to assist in problem resolution.

E.MAIL
info@appmaisters.com

TEL NO
1-888-391-8184

ADDRESS
2245 Texas Drive, Suite 300,
Sugar land, TX 77479

WEB
www.appmaisters.com

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- App Maisters has no warranty obligation for products
  that the Customer acquires from third parties, even if App Maisters assisted in selecting them, and the failure of such products or their suppliers will not affect customer's obligations to App Maisters
- App Maisters has no warranty obligation for the App if a customer acquires services from third party developers.

On behalf of the client	On behalf of App Maisters
Name of Reviewer: Ney McCain	**Project Manager:** James Hasan
Date:	**Date:**
Signature: *Ney McCain*	**Signature:** *James*

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Title	EnergyOne - SOW Signoff Document
File name	SOW Version 1.0 - EnergyOne.docx
Document ID	72f4e8e01dfa6382edc0b0368878d17ed4eb6a5e
Audit trail date format	MM / DD / YYYY
Status	● Signed

Document history

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